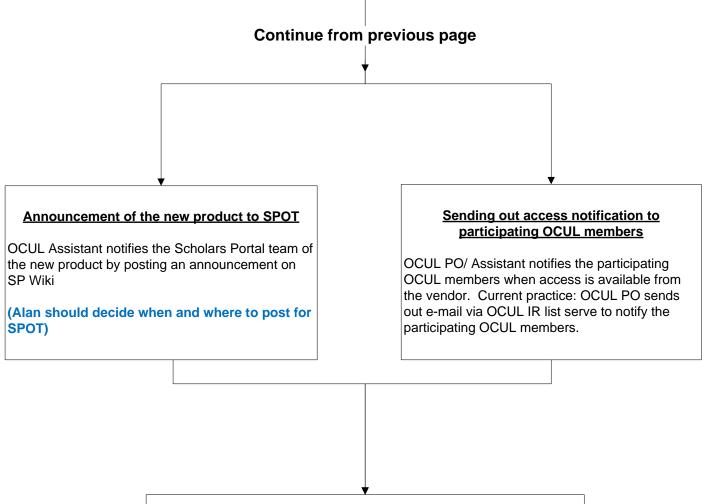
## OCUL E-resources License Management Workflow - New licence/product with a new vendor

## Vendor approaches OCUL members to Consensus reached among OCUL members promote the new product on the new product OCUL members to be approached by vendor Interest from 3 or more OCUL members is with new products in the market place. needed to initiate a consortia purchase with the new vendor. Note: Vendor needs to market and sell the product directly to OCUL members. OCUL OCUL IR members will notify OCUL Projects office does not take part in choosing the Officer (PO) regarding their decisions. product. Items to be negotiated by PO Start of the negotiation and technical Following are the main discussion items with review vendor: - price OCUL PO starts the negotiation. The contract term negotiation process with the vendor usage rights (reserves, course pack, CMS, ILL) usually takes 2-4 months to complete. - local load, perpetual access, and transformation SP technical issues Review new product with SPOT OCUL Projects Officer briefing OCUL PO reviews preservation terms and technical PO or OCUL Assistant provides OCUL Business aspect of the product with SPOT. Officer (BO) with general information and status update by filling the New Licence/Product SPOT contacts for OCUL PO: Worksheet (OCUL share drive P) to record the - preservation terms (Alan to decide) preliminary agreements. - IT or Technical issues (Alan to decide) Successful negotiation-Not Successful Failure to reach an agreement with vendor Preliminary agreement reached with vendor OCUL fails to reach an agreement with vendor. Document the reason in the New Licence/ Product Worksheet for future reference. OCUL reaches an agreement with vendor on consortia pricing and terms for the product. New offer can be made by the vendor to restart the negotiation. **Gather commitment from OCUL** Review responses from OCUL IR IR members for the new product members PO gathers commitment from OCUL PO evaluates final comments OCUL IR members by posting the and feedbacks received from OCUL preliminary information on OCUL IR members. website (OCUL Assistant) Continue on the next

page

## Continue from previous page Confirming rights and detail license terms with vendor OCUL PO works to confirm the rights and detail license terms with vendor. At this point OCUL PO provides the vendor with a list of participating OCUL schools for the product. OR-OR-Using the OCUL licence Using the vendor license OCUL office prefers the vendor to use the OCUL licence. OCUL office prefers the vendor to use the Vendor has the option to amend the licence. OCUL license, but when is not possible OCUL will use vendor license with OCUL Record the vendor amendments in **New Licence/Product** ammendments Worksheet. Licence and contracts management (OCUL Completing the PO portion of the New **Business Officer**) **Licence/ Product worksheet** ► After finalizing the licence terms and agreement OCUL PO completes the PO portion of the New OCUL PO sends the **New Licence/Product** Licence/Product Worksheet with finalized Worksheet and licence to OCUL BO for OCUL pricing, terms, and agreement. Executive Director's signature. Obtain vendor's signature **OCUL Executive Director signature** OCUL office mails out the signed licence for vendor's signature. An electronic copy is scanned and send to vendor as OCUL ED reviews and signs the licence well. agreement prepared by OCUL PO. A fully executed copy (Print, sign by both parties) of the licence is required on file for record management. Notification from vendor for access Update the OCUL OUR Database regarding usage rights Vendor provides access to the product. Date of access should be recorded in New Licence/ Usage rights information to be input on the Product Worksheet. OUR Database and OCUL selectors website to **Note-** Sometimes vendor provides access before be updated by OCUL Assistant. signature on basis of an e-mail agreement with PO. **Invoicing for the product** Invoice is received after access has been provided by the vendor. Payment to be made by Continue on the next COU through existing E-resources accounts page payable process.



## Completing the New Licence/ Product worksheet by OCUL BO

After reviewing all the steps being taken and ensuring proper documentation. OCUL BO completes and signs off the **New Licence/Product Worksheet** for filing with the fully executed licence contract for the new product.